

### **Appendix B-3 (Excerpt)**

## **TransLink<sup>®</sup> Implementation Requirements**

This Appendix defines the Commission's expectations of the transit agencies to ensure a successful operation of the TransLink<sup>®</sup> system in four sections:

- I. Participation Requirements
- II. Fare Media Transition Schedules By Specific Operators
- III. Marketing Requirements
- IV. Youth and Senior Discount Program Requirements

Section I describes general TransLink<sup>®</sup> implementation requirements of participating operators. Section II summarizes the dates by which the five transit agencies which are currently operating TransLink<sup>®</sup> will transition their existing prepaid fare media to TransLink<sup>®</sup>-only availability. In the fare media transition plans submitted to MTC, transit operators identified two concerns which MTC recognizes are critical to smooth implementation of full transition to TransLink<sup>®</sup> and can be addressed only through a collaborative, regional approach: customer awareness of and knowledge about TransLink<sup>®</sup>, and eligibility, validation and distribution of youth and senior cards. Sections III and IV define expectations to resolve these concerns.

### **I. Participation Requirements**

The following transit agencies are currently operating TransLink<sup>®</sup> as their fare payment system: AC Transit, BART, Caltrain, Golden Gate Ferry and Transit, and SFMTA. Additionally, MTC expects to declare SamTrans and VTA as TransLink<sup>®</sup> revenue-ready in 2010. Together these six agencies and one joint powers authority (Caltrain) were slated to be the first to operate TransLink<sup>®</sup> and were classified as charter members in the TransLink<sup>®</sup> Interagency Participation Agreement (IPA). The following describes general TransLink<sup>®</sup> implementation requirements of participating operators. Items 1 through 6 are based on those described in the TransLink<sup>®</sup> IPA, with relevant adjustments, given the impending withdrawal of MTC from the Consortium. Items 7 and beyond define the new responsibilities, based on the impending withdrawal of MTC.

#### **Adapted from IPA**

1. Implement and operate the TransLink<sup>®</sup> fare payment system in accordance with the TransLink<sup>®</sup> Operating Rules, as adopted and amended from time to time by MTC. The current TransLink<sup>®</sup> Operating Rules (approved in April 2009) are incorporated herein by this reference. The TransLink<sup>®</sup> Operating Rules establish operating parameters and procedures for the consistent and efficient operation of TransLink<sup>®</sup> throughout the region.
2. Pay its share of variable operating costs, according to the cost allocation formula set forth in Appendix A to the IPA, Cost Allocation and Revenue Sharing, except to the extent such costs are reduced by the incentive payments made by MTC (as referenced in Appendix A to the IPA).

3. Abide by the revenue sharing formula in Appendix A to the IPA.
4. Make its facilities and staff available to MTC and the TransLink<sup>®</sup> Contractor for implementation of TransLink<sup>®</sup>. Any Operator and MTC may agree to an Operator-Specific Implementation Plan, setting forth specific requirements regarding implementation and operation of TransLink<sup>®</sup> for such Operator.
5. Make determinations regarding the placement of TransLink<sup>®</sup> equipment on the Operator's facilities and equipment; perform necessary site preparation; attend TransLink<sup>®</sup> Contractor training on the use of the TransLink<sup>®</sup> equipment; and provide training to employees using the equipment.
6. Accept transfer of ownership of equipment one year following Conditional Acceptance by each Operator, as defined in Section 8.3 of the TransLink<sup>®</sup> Contract. Maintain and track a list of all equipment.

#### New Requirements

7. Agreement to transfer ownership of the TransLink<sup>®</sup> bank accounts from BART to MTC. MTC will have fiduciary responsibility for patrons' prepaid balances when MTC withdraws.
8. Agreement to implement, operate and promote TransLink<sup>®</sup> as the primary non-cash fare payment system for each Operator. TransLink<sup>®</sup>'s primary market is transit commuters and transit passholders. Operators shall not establish other fare payment systems or fare policies that could deter, discourage or otherwise weaken these patrons' preference to use TransLink<sup>®</sup>, without first consulting and receiving prior approval from MTC.

## **II. Fare Media**

In mid-2009, MTC requested that the five transit agencies which are currently operating TransLink<sup>®</sup> submit plans to describe how they will transition their existing prepaid fare media--i.e., tickets and passes--to TransLink<sup>®</sup>-only availability within two years or less following their revenue-ready date.

The tables below set forth *the fare media* that the designated operator shall convert to TransLink<sup>®</sup>-only availability and *the date* by which the operator shall no longer accept such fare media in its existing form. In general, MTC has emphasized with each operator a transition of those fare products which currently represent a significant portion of that operator's boardings.

No new non-TransLink<sup>®</sup> prepaid fare media shall be created by any transit operator.

An operator will be excused from compliance with a transition date requirement for particular fare media, if the TransLink<sup>®</sup> Contractor has not met at least 75% of the cardholder support service level standards set forth in Section B.1.12 of the TransLink<sup>®</sup> Contract for the two calendar months ending one month before the scheduled transition date. The operator's transition date requirement for the affected fare media will be reset to one month after the TransLink<sup>®</sup> Contractor has met at least 75% of the TransLink<sup>®</sup> Contract's cardholder support service level standards for two consecutive calendar months.

### III. Regional TransLink® Communications and Marketing Activities

1. Effective Date. For operators currently operating the TransLink® system, these TransLink® marketing and communications requirements are effective immediately. For operators not yet operating TransLink®, the requirements are effective two months after MTC's approval of the TransLink® system as Revenue Ready for that operator.
2. General Requirements. Operators shall present TransLink® to customers, employees and media as a fully operational fare payment option. This includes, but is not limited to, identification of TransLink® as a fare payment option in brochures, websites, advertisements, schedules/timetables, email newsletters, internal memos, bulletins and training manuals, and any other materials that describe an operator's fare payment options. Operators shall present TransLink® as an option so that TransLink® has equal or greater prominence than the presentation of other payment options. Each operator shall incorporate and/or modify the presentation of TransLink® in existing brochures, websites, schedules/timetables, etc. whenever the operator next updates the content of these items.

In all cases, operators' marketing and communications about TransLink®, whether in brochures, websites, advertisements or other forms, shall adhere to TransLink® brand guidelines developed by MTC with input from transit operators. The TransLink® Brand Guidelines are available at <https://www.translink.org/TranslinkWeb/toolbox.do>.

3. Equipment Identification. If not already identified as such, operators shall identify TransLink®-compatible fare payment and TransLink®-compatible vending equipment with a decal or other visual identifier to indicate the equipment's TransLink® compatibility.
4. Operator Training. Operators shall ensure appropriate TransLink®-related training for transit operator staff including, but not limited to, vehicle operators, station agents, conductors, customer service personnel, proof of payment officers, ticket sales staff and any other personnel responsible for interacting with customers concerning payment options.
5. Marketing Coordination. Operators shall participate in the development and implementation of a TransLink® marketing and communications initiative that will begin no later than June 1, 2010. This includes, but is not limited to:
  - Staff participation in the development and implementation of the initiative;
  - Dissemination of TransLink® brochures and/or other information materials on vehicles and/or in stations in a manner consistent with the operator's dissemination of other similar operational information; and
  - Providing information about TransLink® utilizing space available on vehicles and/or in stations that is already used by the operator for dissemination of operational information (space available includes, but is not limited to, car cards, posters, and electronic displays).
6. Funding. Funding for the initial phases of the communications and marketing program shall come from the marketing funds already in the TransLink® capital budget and previously assigned to individual operators.

#### **IV. TransLink® Card Distribution Program for Seniors and Youths**

Unless transit operators and MTC agree upon a different time or approach, as of April 1, 2010, transit operators accepting TransLink® shall distribute TransLink® cards to youths and seniors using the following standard region-wide approach:

1. Customers will be able to request cards at all transit agency ticket offices and any other locations approved by the TransLink® Consortium, e.g. senior centers;
2. Transit agency staff or staff at approved locations will verify a customer's date of birth and approve the customer's written application if the customer qualifies for discount fares on any participating agency (up to age 18 for youth cards and not less than age 65 for senior cards);
3. Transit agencies and other approved providers will send all approved applications to the TransLink® Service Bureau (TSB), which is operated by the TransLink® Contractor under contract to MTC;
4. TSB will fulfill all new and replacement cards with the encoded date of birth;
5. TSB will prevent issuance of duplicate cards, hotlist lost/stolen cards, and hotlist cards identified as used fraudulently;
6. TSB will issue the cards without photos;
7. Transit agency personnel may continue using existing tactics to verify that a customer qualifies for a discount; and
8. Transit agency personnel should report fraudulent cards to TSB for hotlisting.

AC Transit shall distribute cards directly to youths, i.e. without involvement from TSB. At its option, AC Transit may issue the cards with photos of the registered bearer of the card. AC Transit shall register the cards in the TransLink® system.